

Middle East Regional Cargo and Logistics Report

• LIVE SITUATION

First US–Iran talks round concluded — road map agreed, technical talks underway all week · Hormuz transit slowly resuming, still contested · Lebanon ceasefire holding, Israel eases border restrictions · Brent ~\$78, lowest since early March · Cargo operations only

MOVE ONE
STANDING
ORDER

DO NOT ROUTE via the central Hormuz channel.

This is a Move One order, not a market read. Transit is rebuilding on the inshore lanes, but the central channel is still mined and uninsurable — political “open for business” messaging does not change that, and no major carrier has committed to it. We route your cargo the long way and land it rather than gamble it on an uncleared lane. The order stands until both conditions are met and verified by our own desk: the channel independently confirmed mine-free, **and** a major carrier running it with war-risk cover restored. Until a Move One Route Resumption Advisory says otherwise, disregard partial-transit headlines and competing closure claims — we are already moving your freight on lanes that work.

BRENT CRUDE \$78.10 ▼4% day Lowest since early March as the risk premium unwinds.	WTI CRUDE \$74.60 Goldman sees Gulf exports normalising by end-July.	HORMUZ STATUS ■ PARTIAL / DO NOT ROUTE Transit slowly resuming on N & S lanes; central route ~80 mines, still contested.	DEAL STATUS ■ ROAD MAP / TECHNICAL First round done; technical talks running this week toward a final deal.
■ OPEN / OPERATIONAL	■ CLOSED / SUSPENDED	■ DISRUPTED / RESTRICTED	■ ADVISORY / INFORMATION

► CHANGES SINCE LAST EDITION

What moved in the last 24 hours

BREAKING	First high-level talks round concluded — road map to a final deal. US–Iran talks reconvened in Switzerland and concluded with a “road map” to a final deal inside the 60-day window, plus a Hormuz deconfliction line and agreement to readmit IAEA inspectors. Technical teams continue this week; nuclear scope unresolved.
BREAKING	Hormuz transit slowly resuming. Traffic rebuilt Monday after the weekend stall — N & S inshore-lane counts recovered toward pre-closure levels; CENTCOM reports steady movement. Iran's 20 June closure still technically stands; central channel remains mined and untouched by majors.
UPDATE	Lebanon ceasefire holding; border easing. After the 19 June renewal collapsed within a day, a firmer truce held into Monday and Israel eased some southern-border restrictions. Still fragile — Israel will not withdraw from the south — but the calmer track is what is letting the strait reopen.
NEW	IAEA inspectors to return; technical talks continue. Iran agreed to readmit IAEA inspectors under the road map; technical teams continue detail work this week. The first concrete confidence-building step since the round concluded — a positive signal, though the nuclear core is unsettled.
UPDATE	Brent falls to a March low on easing risk. Brent fell ~4% to ~\$78, its lowest since early March, as the road map, resuming transit and the Iranian-oil waiver drained the war premium. Surcharges ease only after sustained physical normalisation.
UNCHANGED	Central-channel clearance still ~2 months out. ~80 mines remain and no major carrier has resumed the central channel; BIMCO still puts a safe corridor ~2 months out. The UK/France clearance mission and JMIC's SEVERE→SUBSTANTIAL downgrade help, but the binding constraint is unchanged.
UNCHANGED	DO NOT ROUTE via central Hormuz. Move One's order on the central channel remains in full effect pending independent mine-clearance confirmation and war-risk insurance reinstatement. Cape routing continues — see the standing order on page 1.

TAG KEY

BREAKING

major development

NEW

first reported this edition

UPDATE

revised since last edition

UNCHANGED

standing position holds

► MOVE ONE ASSESSMENT

The deal is holding. The waterway is the proving ground.

TALKS ARE MOVING — AND WASHINGTON PUT MONEY ON IT

The first high-level US–Iran round concluded over the weekend with a “road map” to a final deal inside the 60-day window, a standing line to de-conflict Hormuz incidents, and Iran’s agreement to readmit IAEA inspectors. Technical teams continue the detail work this week, backed by the sanctions relief on Iranian oil. For the first time in the crisis the second-order effects — calmer Lebanon, resuming transit, falling crude — are visible. The nuclear core is unsettled and Trump has kept the threat of renewed strikes on the table.

LEBANON IS THE LEVER — AND FOR NOW IT IS STEADY

The MOU does not require an Israeli withdrawal from southern Lebanon — a US official confirmed it was “not a condition” — so the strike-and-ceasefire cycle there has been the throttle on the whole deal. After the 19 June renewal collapsed within a day, a firmer truce held into Monday and Israel began easing southern-border restrictions. That calmer track is precisely what is letting transit rebuild in Hormuz — but a renewed flare-up would choke the waterway again, so we treat the calm as conditional.

OUR POSITION — THE ORDER STANDS ON THE CENTRAL CHANNEL

Hormuz is not binary: Iran’s 20 June closure declaration technically still stands even as transit rebuilt on Monday and CENTCOM reports steady movement. The north and south inshore lanes carry what moves; the central channel stays mined (~80 mines), BIMCO puts a verified safe corridor ~2 months out, and no major carrier — Maersk included — has resumed it. Easing traffic on the margins is not the core lane reopening. The order lifts only on independent clearance confirmation plus a major carrier resuming with war-risk cover.

OIL AT A MARCH LOW — WHAT IT MEANS FOR YOUR CARGO

Brent has fallen to ~\$78 and WTI to ~\$75, the lowest since early March, as the road map, resuming transit and the Iranian-oil waiver drained the war-risk premium; Goldman still expects Gulf exports back to pre-war levels by end-July. The sanctions relief is time-boxed and conditional — treat its expiry as a hard cliff, screen counterparties against the carve-outs, and keep waiver references on file. This is where Move One’s compliance desk earns its place.

BOTTOM LINE

Momentum, and easing.

A road map, IAEA inspectors returning and transit rebuilding — the environment is loosening, but the nuclear core is unsettled and the clock runs to ~16 Aug.

Lebanon sets the pace.

The strike-ceasefire cycle — not the deal text — governs the strait; for now it is steady and traffic is rebuilding.

Our posture holds.

Central Hormuz stays DO NOT ROUTE until a corridor is independently verified — noise from declarations doesn’t change that.

THE 60-DAY CLOCK	
MOU signed	17 Jun
First round / road map	22 Jun
Technical talks	this week
Talks deadline	~16 Aug

► MARITIME & CARGO OVERVIEW

The waterway picture

LOCATION	STATUS	DETAILS
Straits of Hormuz	■ PARTIAL / DO NOT ROUTE	Transit rebuilding on N & S inshore lanes (Iranian/Omani waters); Monday counts recovered toward pre-closure levels, CENTCOM reports steady movement. Central channel mined (~80) and uninsured; BIMCO puts a verified corridor ~2 months out, majors not yet transiting. Iran's 20 Jun closure technically stands. Move One DO NOT ROUTE order on the central channel.
Salalah CT · OMAN	■ OPERATIONAL	Primary Move One Cape hub. CT and GCT fully operational. Pre-book slots — high demand continues through the clearance period. Oman confirmed no Hormuz tolls. No security incidents.
Red Sea / Bab-el-Mandeb	■ RISK — WATCH	Houthi attacks paused. MARAD 2026-006 active (to 22 Sep 2026). Lebanon ceasefire holding into Monday — reactivation risk eased but not gone; monitor closely. Cape routing remains mandatory.
Arabian Gulf (Upper)	■ RESTRICTED	Behind the central channel. Lloyd's List: ~550 vessels (160 tankers, 200 bulk carriers, 60 container ships, 10 vehicle carriers) staged to exit the Gulf as conditions allow — expect a congestion surge once a corridor clears. Gulf-side feeder via Sharjah and the Saudi landbridge remain active.
Fujairah · UAE	■ ADVISORY	Operational. GPS spoofing Nav Warning 01/2026 active. Crude exports elevated. IRGC control map still active pending full mine clearance.
Khor Fakkan · UAE	■ OPERATIONAL	All berths active. AD Ports bonded landbridge to Jebel Ali / Sharjah active. Elevated dwell; retain as alternate routing.
Port of Aqaba · JORDAN	■ OPERATIONAL	Primary Move One Kuwait/Iraq sea alternate. All terminals normal. Jordan stable. Surface corridors active. Demand remains elevated.
Port of Duqm · OMAN	■ OPERATIONAL	Normal operations. DG cargo: advance ministry approval. Backup Cape hub.

Cape hubs, not a single lane. Salalah (Oman) is the primary Cape hub; Aqaba (Jordan) the primary sea alternate for Kuwait/Iraq; Khor Fakkan (UAE) the secondary container alternate. Choose by destination and slot availability — coordinate with your Move One representative to pre-position.

► COUNTRY-BY-COUNTRY STATUS · I

Gulf core — UAE · Kuwait · Saudi Arabia

UNITED ARAB EMIRATES		
Jebel Ali / DXB·AUH·DWC	■ ADVISORY	Jebel Ali Gulf-side / landbridge only. DXB/AUH/DWC operational. GCAA NOC required for UAE corridor.
Khor Fakkan	■ OPERATIONAL	Primary container gateway. AD Ports bonded landbridge active; multiple feeder services running.
Fujairah / Sharjah	■ ADVISORY	Operational. GPS spoofing Nav Warning active. Crude exports elevated. Sharjah feeder hub active.
HHG & Pets	■ OPERATIONAL	HHG via east-coast ports or DXB/AUH air. GCAA NOC: foa@gcaa.gov.ae. Pet permits required.
KUWAIT · MOVE ONE KUWAIT FULLY OPERATIONAL		
Shuwaikh / Shuaiba SEA	■ OPERATIONAL	Operating normally. Port coordination: andrew.davis@moveoneinc.com.
KWI — Terminals 4 / 5 AIR	■ OPERATIONAL	Kuwait Airways (T4) and Jazeera Airways (T5) on normal schedules. Foreign carriers progressively resuming — Oman Air restarts 25 June via T4.
KWI — Terminal 1 AIR	■ RESTRICTED	Closed for repairs following the 3 June drone strike. No confirmed reopening date. Does not affect T4/T5 or Move One service.
Move One Kuwait	■ OPERATIONAL	Full air and sea service. Air: KWI T4/T5 — MCT primary contingency, AMM alternate. Sea: Shuwaikh direct (Aqaba/KFK contingency). andrew.davis@ / gregory.forgrave@moveoneinc.com.
SAUDI ARABIA		
Jeddah / King Abdullah	■ OPERATIONAL	Both ports fully operational. Primary Cape-route gateway. West-coast landbridge active.
Dammam / Jubail	■ RESTRICTED	Behind the central Hormuz channel. Feeder from Jeddah/KFK. Delays ongoing.
Riyadh / KAIA / Yanbu	■ ADVISORY	Airports operating. King Fahd Causeway open. Do not pay PGSA tolls — US Treasury sanctions apply.
HHG & Pets	■ OPERATIONAL	HHG via Jeddah sea or KAIA air. SABER certification required for regulated goods.

► COUNTRY-BY-COUNTRY STATUS · II

Qatar & Bahrain · Oman · Iraq

QATAR / BAHRAIN		
Hamad Port (Qatar)	■ ADVISORY	Operating via KFK/Jeddah feeder while the central channel clears — Move One moves boxes on it daily. Qatar is an active mediator in both the MOU and the Lebanon ceasefire.
DOH Airport (Qatar)	■ OPERATIONAL	Active. BGW/BSR/EBL resumed 10 May; Gulf cargo routes progressively normalising.
Khalifa Bin Salman (Bahrain)	■ ADVISORY	Operating via King Fahd Causeway and feeder; Move One routing unaffected. Gulf-side normalisation tracks central-channel clearance.
Bahrain Intl (BAH)	■ OPERATIONAL	Airport operating. King Fahd Causeway open. HHG via BAH air or the causeway.
OMAN · LOWEST-RISK ROUTING IN REGION		
Salalah CT	■ OPERATIONAL	Primary Move One Cape hub. CT and GCT fully operational. Pre-book slots. Oman confirmed no Hormuz tolls. Key post-deal transit partner.
Sohar / Duqm SEA	■ OPERATIONAL	Both operational. DG cargo: advance ministry approval. Sohar landbridge active.
Muscat (MCT) AIR	■ OPERATIONAL	Primary regional air hub. Fully operational. Kuwait air contingency alternate. Lowest-risk routing in region.
HHG & Pets	■ OPERATIONAL	HHG via MCT air or Salalah/Sohar sea. Pet import: MAFW permit.
IRAQ · MOVE ONE DWC DIRECT CARGO FLIGHTS		
Umm Qasr SEA	■ ADVISORY	Container operations normal; Move One handling throughput. Basrah Oil Terminal exports suspended. Standard security posture.
Baghdad (BGW) AIR	■ OPERATIONAL	ORBB FIR reopened post-MOU. Move One DWC–BGW direct cargo flights running.
Erbil (EBL) AIR	■ OPERATIONAL	Open and busy. Move One DWC–EBL direct cargo flights running; carrier capacity recovering.
Sulaymaniyah (ISU) AIR	■ OPERATIONAL	Full cargo services. Move One DWC–ISU flights available.
HHG & Pets	■ OPERATIONAL	HHG via BGW/EBL air or Umm Qasr sea (advance coordination).

► COUNTRY-BY-COUNTRY STATUS · III

Levant & the Horn of Africa

JORDAN / ISRAEL / LEBANON		
Port of Aqaba / AMM	■ OPERATIONAL	Aqaba: primary Move One sea alternate for Kuwait/Iraq. AMM: daytime 09:00–18:00 GST. Trebil (Jordan–Iraq) border open.
Haifa / Ashdod (Israel)	■ ADVISORY	Both ports operating; Ashdod not accepting RoRo. Move One running cargo — monitor IDF posture after the 19 June Lebanon flare-up.
Tel Aviv (TLV)	■ ADVISORY	Ben Gurion operating; Move One moving air cargo. Eilat Port closed (Houthi threat); some carrier schedule thinning.
Lebanon (BEY)	■ ADVISORY	BEY airport open and operating; Move One moves cargo with war-risk cover in place. Security volatile after the 19 June strikes — confirm cover on time-critical shipments.
HHG & Pets	■ ADVISORY	Jordan: via AMM/Aqaba. Israel: via TLV/Haifa (not Ashdod RoRo). Lebanon: avoid. Pet: IVSAB / Jordan vet authorisation.

HORN OF AFRICA ETHIOPIA · DJIBOUTI · ERITREA		
Djibouti Port / Camp Lemonnier	■ OPERATIONAL	Fully operational. US Camp Lemonnier ongoing. Key Red Sea alternate and Ethiopia import gateway.
Addis Ababa (ADD)	■ OPERATIONAL	Fully operational. Key Move One hub for sub-Saharan / Horn of Africa distribution.
Ethiopia — Tigray/Amhara	■ ADVISORY	Move One runs established corridors into the north with security coordination — we deliver where others pause. Post-conflict recovery ongoing.
Eritrea (ASM)	■ ADVISORY	Move One operates with case-specific clearance. Build in lead time for permits.
HHG & Pets	■ ADVISORY	HHG via ADD air or Djibouti sea. Standard African customs documentation required. Somalia: see dedicated section.

► COUNTRY-BY-COUNTRY STATUS · IV

Sudan & Chad · Afghanistan & Pakistan

SUDAN / CHAD · DARFUR CROSS-BORDER		
Port Sudan	■ ADVISORY	Move One's primary Sudan gateway, operating. SAF/RSF conflict inland means Khartoum/Darfur/Kordofan delivery is run convoy-by-convoy — a capability few can match. joseph.myers@ / gregory.forgrave@moveoneinc.com.
N'Djamena (NDJ)	■ OPERATIONAL	Operational. Move One's established Darfur cross-border corridor runs via NDJ and Abeche — NGO/UN routes active daily.
Abeche (AEH)	■ ADVISORY	Key staging for eastern Chad / Darfur cross-border ops. Move One active. Advance coordination required.
HHG & Pets	■ CLOSED	HHG not advisable to Sudan under current conflict conditions. Chad HHG via NDJ only — very limited services.
AFGHANISTAN / PAKISTAN		
Hairatan (North Corridor)	■ OPERATIONAL	Primary Afghanistan entry. Uzbekistan–Afghanistan rail/road corridor — the only reliable overland route for bulk cargo. Move One active.
Kabul / Kandahar (KBL/KDH)	■ ADVISORY	Move One operates scheduled and cargo services into KBL/KDH with Taliban ministry coordination — not charter-only. Humanitarian cargo via UNHAS where required.
Torkham (PAK–AFG)	■ CLOSED	Closed. Afghanistan via Hairatan only.
Karachi / ISB / KHI	■ OPERATIONAL	Pakistan ports and airports operating normally. Active diplomatic role in MOU implementation.
HHG & Pets	■ ADVISORY	Pakistan: via KHI/ISB. Afghanistan: Hairatan only. No commercial HHG/pets to/from Afghanistan.

► COUNTRY-BY-COUNTRY STATUS · V

Syria & Somalia

SYRIA · TRANSITIONAL GOVERNMENT · OFAC SCREENING MANDATORY		
Latakia / Tartus SEA	■ OPERATIONAL	Mediterranean ports operational under the transitional government. Move One moves commercial and reconstruction cargo with full OFAC/Treasury screening on every shipment.
Damascus (DAM) AIR	■ OPERATIONAL	International and cargo services progressively restored since the transition; sanctions easing reopening carrier capacity. Move One handling air freight with compliance review.
Aleppo (ALP) AIR	■ ADVISORY	Open with reconstruction-driven inbound demand. Coordinate slots in advance; northern security posture variable.
Nasib / Bab al-Hawa LAND	■ OPERATIONAL	Nasib (Jordan) and Bab al-Hawa (Turkey) overland corridors active for relief and commercial cargo; standard convoy protocol.
Compliance & HHG	■ ADVISORY	All Syria cargo screened under current OFAC easing — dual-use review and denied-party screening mandatory before booking. Compliance routing: carl.corriveau@moveoneinc.com .

SOMALIA · CORE MOVE ONE HARD-AREA CAPABILITY		
Mogadishu Port / MGQ	■ OPERATIONAL	Port and Aden Adde airport operational. Move One runs commercial, humanitarian and government cargo with security coordination — where others step back, we deliver.
Berbera (Somaliland)	■ OPERATIONAL	DP World terminal stable and efficient; the preferred alternate to Mogadishu and a gateway to the Ethiopia landbridge.
Bosaso (BSA) PUNTLAND	■ ADVISORY	Northern port and airport active for charter and cargo with coordination. Move One established on the route.
Inland movement	■ RESTRICTED	Al-Shabaab threat persists outside secured zones; inland delivery run convoy-by-convoy with security coordination. Government & NGO routes: gregory.forgrave@moveoneinc.com .
HHG & Pets	■ ADVISORY	HHG via MGQ air or Berbera sea, coordinated individually. Allow lead time for permits and security clearance.

Hard-area logistics is the franchise. Syria's reopening and Somalia's security environment are exactly where Move One's compliance desk and ground coordination create an edge competitors cannot quickly replicate. Engage your representative early — these moves are planned, not booked off a rate sheet.

► GENERAL ADVISORY

Standing guidance by mode

SEA FREIGHT

- **Do not route via the central Hormuz channel.** Transit is rebuilding on the N & S inshore lanes, but the central channel is mined (~80 est.) and uninsured. Do not rebook on resuming-transit or political reporting ahead of a Move One Route Resumption Advisory.
- Kuwait sea: Shuwaikh/Shuaiba operating normally — andrew.davis@moveoneinc.com. Aqaba / Khor Fakkan retained as contingency alternates only.
- Cape hubs: Salalah (Oman) primary — pre-book slots, high demand. Aqaba (Jordan) primary alternate; Khor Fakkan (UAE) secondary. ~550 vessels preparing to exit the Gulf — congestion surge likely; pre-position with your rep.
- Red Sea: MARAD 2026-006 active (to 22 Sep 2026). Houthi attacks paused and the Lebanon ceasefire is holding, but reactivation risk is not gone. Cape mandatory until the advisory is formally lifted.
- Do not pay Persian Gulf Strait Authority tolls. G7 condemned them; US Treasury sanctions apply.

AIR FREIGHT

- Kuwait KWI: open via Terminals 4/5 (normal schedules). T1 closed for repairs — does not affect Move One Kuwait service. All Kuwait air: andrew.davis@moveoneinc.com.
- MCT (Muscat) primary Kuwait air contingency; AMM (Amman, 09:00–18:00 GST) alternate.
- DXB/AUH/DWC fully operational. Move One DWC direct cargo flights active: DWC–BGW, DWC–EBL, DWC–ISU. GCAA NOC for UAE corridor: foa@gcaa.gov.ae.
- **ORBB/Baghdad FIR reopened to overflights post-MOU.** Lebanon (OLBB) airspace: maintain avoidance at all altitudes — ceasefire holding but volatile after the 19 June escalation.

ROAD FREIGHT

- King Fahd Causeway (Saudi–Bahrain): open. Trebil (Jordan–Iraq): open. Torkham (PAK–AFG): closed — Afghanistan via Hairatan only.
- Sudan/Chad: Port Sudan primary; N'Djamena and Abeche for Darfur cross-border. Advance coordination: gregory.forgrave@moveoneinc.com.

SURCHARGES & EQUIPMENT

Bunker / EFS-EBS

Active. Brent near \$78 — a March low; physical normalisation still runs months behind the politics, with a verified Hormuz corridor ~2 months out. Carriers revise weeks after sustained physical change, not on announcements.

War-risk

Elevated on the central Hormuz channel — uninsurable until mines cleared and P&I cover restored. Partial-route activity does not reduce central-channel premiums. Air war-risk elevated longest.

Rate strategy

Spot rates whipsawed around the road map, the sanctions waiver and the contested closure. Do not rebook the whole portfolio at spot. Hold locked agreements and re-evaluate as clearance is independently confirmed.

Surcharge levels and dwell times are qualitative here by policy — contact your Move One representative for current figures specific to your lane.

► WATCH POINTS

The five signals worth waking up for

01	DURABILITY OF THE TALKS ROAD MAP The first high-level round concluded with a road map to a final deal and a Hormuz deconfliction line; technical talks are continuing through this week and IAEA inspectors are being readmitted. Watch whether the technical rounds hold to schedule — and whether Trump's standing threat of renewed strikes derails them.
02	LEBANON CEASEFIRE DURABILITY After the 19 June renewal collapsed within a day, a firmer truce held over the weekend and into Monday, with Israel easing some southern-border restrictions. Israel still will not withdraw from southern Lebanon, which the MOU does not require — so a renewed flare-up remains the single biggest near-term risk to implementation and to the strait staying open.
03	CENTRAL HORMUZ MINE CLEARANCE ~80 mines remain in the central channel; BIMCO and Intertanko put a verified safe corridor ~2 months out. Britain and France have offered a joint clearance mission. Monitor UKMTO incident reports, Lloyd's war-risk pricing, and — the decisive signal — the first major carrier announcing central-channel resumption.
04	SANCTIONS-RELIEF DURABILITY The Iranian-oil sanctions waiver accompanying the deal is time-boxed and conditional on talks progress, and the reconstruction-fund mechanics remain undefined. Watch for renewal, widening, or a snap-back — and screen every counterparty against the carve-outs before relying on the relief.
05	RATE & CAPACITY REPOSITIONING Brent near \$78 — its lowest since early March — as the risk premium unwinds; Goldman expects Gulf exports to normalise by end-July. Lloyd's List estimates ~550 vessels preparing to exit the Gulf — a major congestion event once the corridor clears. Lock forward agreements now rather than waiting for full normalisation.

► MOVE ONE UNIQUE CAPABILITIES

Where others step back, our corridors keep moving.

Darfur / Chad Operations Active routing into Darfur and Chad via established aid and diplomatic corridors. Direct NGO and government coordination on the ground via N'Djamena and Abeche.	Gaza Operations Carl Corriveau leads Gaza capability — humanitarian corridor access, import/export coordination and specialist logistics for the most complex delivery environment in the region.
US Military Bases (CENTCOM AOR) Regulated freight, HHG and critical logistics to US military installations across CENTCOM — Diego Garcia, Al Udeid, Kuwait bases and beyond. Urgent base logistics: gregory.forgrave@moveoneinc.com.	Syria & Yemen Compliance Routing Full OFAC / US Treasury sanctions compliance — including live reading of the new Iranian-oil sanctions waiver and its carve-outs. Dual-use review, denied-party screening and lawful humanitarian exemptions for Syria and Yemen-adjacent cargo.

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